HRD 5308 Needs Assessment in HRD (20281)

Spring 2025

Department of Human Resource Development
Soules College of Business
The University of Texas at Tyler

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Instructor:	Dr. Yonjoo Cho (ycho@uttyler.edu), Professor
Class Time:	1/13 – 4/27 (Spring Break: Week of 3/17)
<mark>Orientation</mark>:	1/14 (Tue) at 7:00pm CT via Zoom
<mark>Bi-Weekly Meetings (optional)</mark>:	Week 2 (1/21), Week 4 (2/4), Week 7 (2/25), Week 9 (3/11), and Week 11 (3/25) at 7:00pm CT
Office Hours for Individual Clinic:	Tuesdays at 7:00pm to 8:30pm – Reserve a 15- or 30-minute slot on a Google Doc at the week's Read Me First
<mark>Draft Report Presentation</mark>:	Week 14 (4/15) at 7:00pm CT via Zoom
Final Presentation to Client:	Week 15
Communication:	Canvas, emails, Zoom, and Telephone (903-566-7260)
Course Access:	https://uttyler.instructure.com/courses/45170
Zoom:	https://uttlyer.zoom.us/my/yjcho

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COURSE DESCRIPTION

This course centers on concepts, cases, and practices of needs assessment in HRD. The identification of needs is a starting point for performance improvement in organizations. The process of conducting needs assessment has a greater impact on performance improvement by attending to the context in the organization. While needs assessment is preceded by needs analysis, due to the nature of the overlap of the two in small-scale class projects, the terms *needs assessment* and *needs analysis* will be used interchangeably in this course.

COURSE GOALS

The goals of the course include the following:

- To understand concepts, principles, and cases of needs assessment in diverse organizations
- To learn how to use data collection and analysis methods and SWOT Analysis as the final step of data analysis in the needs assessment process
- To carry out a needs assessment project by working with a real organization that student teams choose
- To learn the balancing act of individual and teamwork activities to fully grasp the gist of needs assessment in HRD

CORE COMPETENCIES

By the end of the semester, students will be able to:

- Identify performance needs in the organization through reading required readings, discussions of cases, and conducting a needs assessment project in teams.

- Learn and practice data collection (e.g., interviews, surveys) and analysis methods (e.g., content analysis, descriptive statistical analysis) and use SWOT Analysis as the final step of data analysis.
- Perform a needs assessment of a client organization:
  - Select a project topic and client
  - Write a one-page proposal
  - Collect and analyze data and use a SWOT Analysis as a final step of data analysis
  - Create a final report and present findings and recommendations to client.
- Develop communication skills from working with team members, the instructor, and clients, to become a *professional* needs analyst or needs assessor.
- Reflect on lessons learned from individual, teamwork, and class participation activities.

COURSE OUTLINE

See Figure 1 for a needs assessment process that students are required to follow:

Figure 1
The Needs Assessment Process
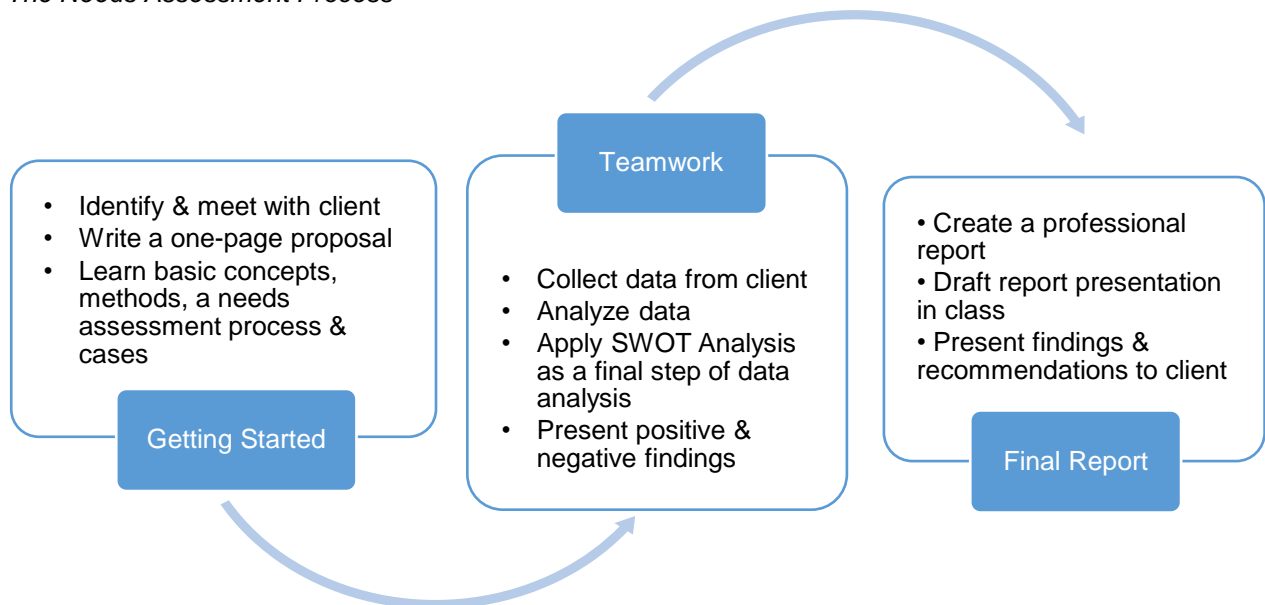
This course is composed of five units: introduction, basics, data collection, data analysis (SWOT Analysis as the final step), and synthesis (draft and final presentation and reflection).

Unit 1: Introduction
Understand the structure of this course: teamwork, my expectations, assignments, grading policies, and ethical and professional considerations.

Unit 2: Basics
Develop a common understanding of basic concepts, underlying principles, and cases of needs assessment in HRD.

Units 3-4: Data Collection and Analysis
Learn and practice data collection and analysis methods in a needs assessment process:

- Data collection (e.g., interviews, surveys) and analysis methods (e.g., content analysis, descriptive statistical analysis)
- SWOT Analysis as the final step of data analysis

Unit 5: Synthesis - Presentations and Reflection
Present findings and recommendations in class (draft presentation) and to client (final presentation):

- Present a draft report to class to gather feedback from classmates and me.
- Finalize a professional report.
- Present findings and recommendations in the final report to client.

Write a reflection paper highlighting lessons learned from teamwork and class activities.

READ ME FIRST (Canvas Modules)

This is the place where you begin each week by reading a Read Me First (Canvas Modules) that will guide you to things to do in the following week, and it will be posted by Saturday at 9:00am CT.

SYNCHRONOUS MEETINGS

Research on online teaching and learning (e.g., Garrison et al., 2000[1]) indicates that students need synchronous meetings to feel **presence** in online classes. To that end, we have five bi-weekly meetings via Zoom to discuss the content and assignments:

- Orientation in Week 1 (1/14) at 7:00pm CT
- Five bi-weekly meetings: Week 2 (1/21), Week 4 (2/4), Week 7 (2/25), Week 9 (3/11), and Week 11 (3/25) at 7:00pm CT These meetings are optional, but I suggest at least one team member join a meeting to be on the same page. For those who did not make it, I will provide a recording of the Zoom session on the week's Read Me First.
- Team clinic in Week 12
- Draft report presentation in Week 14 (4/15) as a rehearsal for the final presentation to client. At least two students must be present, one for presentation and the other for answers.

INDIVIDUAL AND TEAM WORK

This course consists of individual work (41%) and team project-based learning (59%) as many business courses are, so students work in teams as well as individually. For teamwork:

- I have randomly assigned you to a team of four students, based on the past students' feedback on the difficulty of choosing team members in the first week.
- Name your team for team building purposes. Be creative! 😊
- Establish the ground rules for quality teamwork (see Appendix 2 for a sample). To evaluate both your and team members' teamwork, I will ask you to fill out a peer evaluation form (see Appendix 8) twice, at mid-term and the end of the semester. At mid-term, revisit your ground rules to refresh your teamwork. Your team contribution points (out of 10) will be converted from your average peer evaluation score (out of 4).

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[1] Garrison, D. R., Anderson, T., & Archer, W. (2000). Critical inquiry in a text-based environment: Computer conferencing in higher education. *The Internet and Higher Education*, *2*(2-3), 87-105. https://doi.org/10.1016/S1096-7516(00)00016-6

CLIENT INVOLVEMENT

In this course, client involvement is essential as they are instrumental for students to apply what they learn in class to a real organization so that student teams can provide evidence-based findings and recommendations. Here are four recommended client selection criteria:

- Fit: Do your client's needs fit the objective of your need assessment project?
- Accessibility: Is your client willing to work with you?
- Familiarity: Do you know your client a little bit, though not fully, to easily get started?
- Availability: Is your key contact person (a major stakeholder) always available to assist you all the time?

You may choose a team member's employer. I highly encourage you to identify a client to work with as soon as you form a team. I will ask your client to evaluate the quality of your project work: qualitative details and quantitative evaluation (20 points) at the end of the week of your final presentation.

FEEDBACK-BASED

Research shows that team-based project learning is not possible without the instructor's timely feedback; therefore, I am going to provide quick and detailed feedback for you to move forward as planned. In the process, you will learn how to meet assignment requirements, develop critical thinking skills, and improve writing as a graduate student, using the **APA formatting guidelines** as required in HRD and in the College of Business at UT Tyler. We are scheduled to meet via Zoom on a bi-weekly basis. If you need to meet me for an individual clinic, make an appointment for 15- or 30-minutes on a **google doc** that will be added at the end of the week's Read Me First.

INSTRUCTOR EXPECTATIONS

Online courses are based on two-way communication between the instructor and students. I expect you to aim for high quality standards required at the graduate level. It is YOU who should take responsibility for achieving the set learning goals and completing all assignments and class activities within the due dates. In each step of the process, I will be there to provide you with prompt and detailed feedback. If assignment guidelines are unclear to you, ask for clarification. If you do not understand my evaluation comments, ask for extra feedback. As this is my flagship course that I have taught since 2008, I hope that it clearly sets the right expectations for what to do (e.g., teamwork) and what not (e.g., freeride). The bottom line is to learn as intended so that you will become **an informed HR practitioner**, needs analyst, or needs assessor in diverse contexts. To achieve this goal, be willing to learn required competencies as a graduate student including writing a one-page proposal, the use of SWOT Analysis, and APA writing style. A critical success factor is communication, communication, and communication!

ASSIGNMENTS AND DUE DATES

Complete four assignments in this course: weekly discussion postings, a needs assessment project, class participation activities, and a reflection paper. Submit assignments **in Word** unless there are specific guidelines. All assignments are due by **Sundays at 11:59 pm CT,** except weekly postings:

Assignment		Level	Point (%)	Due
Weekly Discussion Postings (10 pts x 8 weeks)		Ind	80 (21)	Weeks 1, 2, 3, 4, 5, 7, 8, & 9: 1 Answer by Wed & 2 Comments by Sat
Needs Assessment Project	1. Team formation by the instructor	Team	230 (59)	1/13
	2. Team ground rules (10)			1/26
	3. Client Selection and Initial Meeting (10)			2/2
	4. One-page proposal (30)			2/9
	5. Permission letter (10)			2/16
	6. Progress report (30)			3/16
	7. SWOT Analysis (20)			3/30
	8. Team Clinic			Week of 3/31
	9. Draft Report (40) & ppt file			4/13
	10. Draft Presentation (20)			<mark>4/15 at 7:00pm</mark>
	11. <mark>Client feedback on findings and recommendations after draft presentation</mark>			Week of 4/14
	12. Final Report (30) & transmission letter (10)			4/20
	13. Final presentation to client			Week of 4/21
	14. Client evaluation (20) (*Note*: I will solicit this for you!)			4/25 (Fri)
Class Participation Activities	Introduce Yourself (10)	Ind	60 (15)	<mark>1/15 (Wed)</mark>
	Discussion lead (20)			(Your choice)
	Team contributions: Mid-term & final peer-evaluation (10x2)			3/2 & 4/27
	Class evaluation (mid-term) (10)			3/2
Reflection Paper		Ind	20 (5)	4/27
Total			390 (100)	

WEEKLY DISCUSSION POSTINGS (80 pts)

You will develop an understanding of concepts, principles, and cases of needs assessment in the first nine weeks of the semester through reading two required readings, except in Week 6, at a time when I attend the 2025 AHRD Conference in Arlington, VA. Each week, I will post a discussion question on Canvas Discussion, and a discussion leader of a discussion group will lead the week's discussion.

Post one compact and pointed answer **<mark>within three sentences</mark>** by the end of **Wednesday** and two comments on other students' answers by the end of **Saturday**. This assignment is worth **10 points** each week: **8 points for an answer and 2 (1x2) points for two comments**. In commenting, don't just say "yes" or "no" and add the reasons why you say "yes" or "no" to receive one point for one comment. See the following, compact and pointed sample answer:

Discussion question: How do you define needs assessment in your own words?

Sample answer: Sleezer et al. (2014) defined needs assessments as assessing existing key issues to reach a desired outcome by determining strategies to bridge this gap. Ruff-Eff and Sleezer (2020) emphasized that needs assessment is a thorough process to close learning and performance gaps, which requires team collaboration, a complete comprehension of data collection, and ongoing consultations. Based on the two readings, I define needs assessment as identifying current problems and taking action toward where you want to be in an organization or community (quoted from Angelica Reyes, 2024).

A discussion leader will lead the week's discussion. Choose a week to play a discussion lead role and write down your choice on a **google doc**. **Discussion lead** is an excellent opportunity to manage a week's discussion so that you learn how to deepen your knowledge on the week's topic and to ask probing questions to engage students in in-depth discussion. This assignment has been highly valued by students in previous years. As a discussion leader:

- Read all required and optional readings.
- Read all student postings.
- Respond to interesting or intriguing postings, provide thoughtful feedback, and ask probing questions for in-depth discussion.
- To earn the full 10 points, you must be present throughout the week of your choice, for a minimum of three days.

In the process of weekly discussions, students will better understand concepts and principles needs assessment and develop critical thinking skills. I will provide feedback on your postings if you did not meet the posting requirements on Thursday morning so that you may revise your answer by **Saturday**. I suggest you post your answer and two comments early so that you can actively engage in discussion. I also suggest you do not add References at the end of your compact and pointed answer, unless there are new readings cited, just to save space (see **Appendix 1** for the postings rubric).

NEEDS ASSESSMENT PROJECT (230 pts)

Work in teams. This final project is a great opportunity to apply the concepts, principles, and a SWOT Analysis you learned to a real organization. To that end, work through the following:

- Form a team of four students, name your team, and set up the team ground rules (see **Appendix 2** for the team ground rules sample).
- Select a client who is interested in working with you to assess performance needs in the organization. Your client can be a profit or non-profit organization, university unit, school, small startup company, or the military. A team member's employer may be a good choice.
- In an initial meeting with your client, find out the organization's performance needs, gather background information, and select a project topic. In this meeting, you should clarify what you can do and what not (called "frame factors") to clearly set the same expectations for both. In other words, don't be too ambitious about the project outcomes.
- Based on the information gathered from the initial meeting, write a **one-page proposal,** including:

  - Clearly state the project title and purpose
  - Background (context)
  - Key stakeholders from whom you will collect data
  - Frame factors limiting the scope of the project
  - The data collection and analysis process
  - A (tentative) schedule (milestones) and division of labor concerning who is doing what (see **Appendix 3** for the one-page proposal rubric and **Appendix 4** for the one-page proposal sample).

- As a one-page proposal serves as an **informal contract** for your client, I suggest you make it **professional**, which means that you must include all key elements to plan a needs assessment process in detail. You may have to revise it until I say **yes**. You will share the final proposal with your client so that you can receive a signed permission letter from your client (see **Appendix 5** for the permission letter sample).
- Follow the steps to collect data using qualitative (e.g., interviews) and quantitative (e.g., surveys) data collection methods and analyze the data using qualitative (e.g., content analysis) and quantitative (e.g., descriptive statistics) methods for triangulation. The more data you collect, the better for credibility.
- Use a **SWOT Analysis** as the final step of data analysis and present findings and recommendation.
- Once you go through all steps, write a single-spaced, ten-page **draft report**, except appendices and references. The key components of the report include:

    1. The cover page includes a project title, the course title, submission date, and team member names.
    2. A one-page Executive Summary outlines the report.
    3. Acknowledgements include all key stakeholders' full names to express apprecaition for their assistance.
    4. Table of Contents (TOC) includes the main body, appendices, and references, along with page numbers. Do not add the front matter (Executive Summary and Acknowledgements) in TOC!
    5. **Introduction (p. 1)** includes the purpose statement (scope), information about the context (background), and frame factors (project-, organization-, and consultant-wise). The main page numbering begins on this page.
    6. Project Methodology includes the data collection and analysis process. A literature review on the project topic is the first step to follow, before collecting data.
    7. **SWOT Analysis** as the final step of data anlaysis includes **internal** strengths and weaknesses and **external** opportunities and threats. Provide a figure of SWOTs, listing bullets in four cells.
    8. Findings include strengths and areas for improvement. **Number findings consecutively,** as in Finding 1, Finding 2. . . and Finding 10, which will be referred back to in Recommendations.
    9. Recommendations include implementation steps and critical success factors. Each recommendation should refer to related findings to provide evidence.
    10. Appendices include extra information you developed, as in Appendix A: One-Page Proposal and Appendix B: Permission Letter.
    11. References are located at the end, to evidence that you reviewed the literature on the project topic.

In **draft presentation in Week 14**, teams report on their draft report via Zoom and receive feedback from me and classmates. This has been extremely helpful as it is a rehearsal before a final presentation to their client and as teams can see how other teams are doing as well. After draft presentation is over, teams should ask their client to provide feedback on findings and recommendations (and not the entire report!), finalize the draft report based on feedback, submit the final report to me and the client (due: April 20), along with a transmission letter, and present findings and recommendations to the client as scheduled in the week of April 21. The **final report** should be written in a compact, pointed, and professional manner so that your client can easily understand (see **Appendix 6** for the final report rubric).

Your report will be evaluated for criteria including: (a) all required elements, (b) organization and logical flow, (c) clarity, (d) consistency (e.g., design considerations), (e) professional outlook (e.g., appropriate visuals on the cover page, no running text), and (f) attention to detail (e.g., APA).
Once your final presentation is over, I will ask for client evaluation (20 pts.) on the quality of your final report and presentation as well as teamwork (see **Appendix 7** for the client feedback sample). Final report samples are available on Canvas Files.

CLASS PARTICIPATION ACTIVITIES (60 pts)

Actively participate in class activities: (a) your introduction, (b) discussion lead, (c) peer evaluation at the mid-term and final (see **Appendix 8** for the peer evaluation form), and (d) the mid-term class evaluation via *Qualtrics*.

REFLECTION PAPER (20 pts)

Write a (single-spaced, one-page) reflection paper. This end-of-class reflection should include lessons learned from class activities and team project learning. To that end, include: (a) a title, purpose, and introduction, (b) key points of lessons learned, and (c) suggestions/conclusions. To that end, title the reflection paper to aptly sum up your learning experience in a nutshell.

GRADING GUIDELINES

See Assignment Guidelines on Canvas to ensure that you understand evaluation criteria before beginning an assignment. No incompletes will be awarded unless there is an emergency. In case of a **late submission**, there will be one point subtracted from your grade per day. To receive no penalty for late submission, you must inform me of the reason why you need an extension or incomplete **in advance**.

COURSE POLICIES

Artificial Intelligence (AI) Use
UT Tyler is committed to exploring and using artificial intelligence (AI) tools as appropriate for the discipline and task undertaken. We encourage discussing AI tools' ethical, societal, philosophical, and disciplinary implications. All uses of AI should be acknowledged as this aligns with our commitment to honor and integrity, as noted in UT Tyler's Honor Code. Faculty and students must not use protected information, data, or copyrighted materials when using any AI tool. Additionally, users should be aware that AI tools rely on predictive models to generate content that may appear correct but is sometimes shown to be incomplete, inaccurate, taken without attribution from other sources, and/or biased. Consequently, an AI tool should not be considered a substitute for traditional approaches to research. You are ultimately responsible for the quality and content of the information you submit. Misusing AI tools that violate the guidelines specified for this course (see below) is considered a breach of academic integrity. The student will be subject to disciplinary actions as outlined in the Academic Integrity Policy.

In this course, AI is not permitted at all. I expect all work students or student teams submit for this course to be their own. I have carefully designed all assignments and class activities to support your learning. Doing your own work, without human or artificial intelligence assistance, is best for your efforts in mastering course learning objectives. In this course, I forbid using ChatGPT or any other AI tools for any stages of the work process. Deviations from these guidelines will be considered a violation of UT Tyler's Honor Code and academic honesty values.

Late Work
No credit will be given for late assignments unless the student's provider and/or UT Tyler's system prevents the student from submitting a discussion post, assignment, or quiz. The student is responsible for contacting the instructor, providing evidence of submitting any missed work within 24 hours.

Academic Dishonesty Statement
The faculty expects from students a high level of responsibility and academic honesty. Because the value of an academic degree depends upon the absolute integrity of the work done by the student for that degree, it is imperative that a student demonstrates a high standard of individual honor in his or her scholastic work.

Scholastic dishonesty includes, but is not limited to, statements, acts or omissions related to applications for enrollment of the award of a degree, and/or the submission, as one's own work of material that is not one's own. As a general rule, scholastic dishonesty involves one of the following acts: cheating, plagiarism, collusion and/or falsifying academic records. Students suspected of academic dishonesty are subject to disciplinary proceedings.

University regulations require the instructor to report all suspected cases of academic dishonesty to the Dean of Students for disciplinary action. In the event that disciplinary measures are imposed on the student, it becomes part of the students' official school records. Also, please note that the handbook obligates you to report all observed cases of academic dishonesty to the instructor.

Plagiarism will not be tolerated, and learners should be aware that all written course assignments will be checked by plagiarism detection software. Violations of academic integrity will be reported and processed according to the guidelines established by the University.

UNIVERSITY POLICIES
Information is available on the Canvas Syllabus.

COLLEGE OF BUSINESS STATEMENT OF ETHICS

The ethical problems facing local, national, and global business communities are an ever-increasing challenge. It is essential the Soules College of Business help students prepare for lives of personal integrity, responsible citizenship, and public service. To accomplish these goals, both students and faculty of the Soules College of Business at The University of Texas at Tyler will:

- Ensure honesty in all behavior, never cheating or knowingly giving false information.
- Create an atmosphere of mutual respect for all students and faculty regardless of race, creed, gender, age, or religion.
- Develop an environment conducive to learning.
- Encourage and support student organizations and activities.
- Protect property and personal information from theft, damage, and misuse.
- Conduct yourself in a professional manner both on and off campus.

Furthermore, the Soules College of Business strongly adheres to the UT Tyler Honor Code: *"Honor and integrity that will not allow me to lie, cheat, or steal, nor to accept the actions of those who do.*"

RESOURCES

Mini Lectures
Mini lectures on APA formatting guidelines, postings, client selection, one-page proposal, the needs assessment project process, data collection and analysis, and SWOT Analysis are posted in Canvas Files.

APA Formatting Guidelines
In any workplace, writing well in a compact and pointed way is highly encouraged as it is a way to effectively communicate your ideas in the organization. In this course, you must follow the APA (2020)[2]. In all writing assignments, follow the APA formatting guidelines as it is required in the UT Tyler HRD MS degree program. Follow the basics of APA on Canvas Files and see how I referenced publications in this syllabus. You will learn how to write well in a compact and pointed way at the end, as APA is not just about editing but also about organizing ideas.

HRD Journals: Five representative HRD journals include:

- *Advances in Human Resource Development* (*ADHR*)
- *European Journal of Training and Development* (*EJTD*),
- *Human Resource Development International* (*HRDI*)
- *Human Resource Development Quarterly* (*HRDQ*), and
- *Human Resource Development Review* (*HRDR*).

If you become a student member in the Academy of Human Resource Development (AHRD), you can easily access all four AHRD-sponsored journals (*ADHR*, *HRDI*, *HRDQ*, and *HRDR*).

The HRD Masterclass Podcast Series (hrdmasterclass.com)
This is developed by the AHRD and explores the fundamentals of HRD and how those are changing in the workplace. Each of the 60 to 90-minute episodes focuses on a different aspect of HRD and includes a one-on-one discussion with each guest, as well as a group discussion where all the guests are together to discuss their shared interest in the episode topic. This is an outstanding resource to understand the most current topics and foundations of HRD.

TEXTBOOKS

<mark>No textbook is required</mark>.

Recommended:

Rossett, A. (2009). *First things fast: A handbook for performance analysis* (2nd ed.). Pfeiffer.
Russ-Edt, D. F., & Sleezer, C. M. (2020). *Case studies in needs assessment*. SAGE.
Sleezer, C. M., Russ-Eft, D. F., & Gupta, K. (Eds.) (2014). *A practical guide to needs assessment* (3rd ed.). Wiley.

FIVE NEEDS ASSESSMENT CASES

Aull, J., Bartley, J., Olson, C., Weisberg, L., & Winiecki, D. (2016). Lesson learned while completing a needs assessment of ITSS, Inc. career development opportunities: A case study. *Performance Improvement Quarterly*, *28*(4), 7-26. https://doi.org/10.1002/piq.21207 **[Case 2]**

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[2] American Psychological Association. (2020). *Publication manual of the American Psychological Association: The official guide to APA style* (7th ed.). American Psychological Association.

Cho, Y., & Brown, C. (2013). Project-based learning in education: Integrating business needs and student learning. *European Journal of Training and Development*, *37*(8), 744-765. https://doi.org/10.1108/EJTD-01-2013-0006 **[Case 5]**

Mills, E., & Stefaniak, J. (2020). A needs assessment to align perspectives for the career needs of international students. *Performance Improvement*, *59*(9), 6-14. https://doi.org/10.1002/pfi.21936 **[Case 3]**

Stefaniak, J. E., Mi, M., & Afonso, N. (2015). Triangulating perspectives: A needs assessment to develop an outreach program for vulnerable and underserved populations. *Performance Improvement Quarterly*, *28*(1), 49-68. https://doi.org/10.1002/piq.21186 **[Case 1]**

Swart, W. (2021). Academic needs assessment: Continual improvement for academic units. *Performance Improvement*, *60*(1), 19-24. https://doi.org/10.1002/pfi.21950 **[Case 4]**

REQUIRED READINGS

All weekly readings are posted in Canvas Files ("weekly readings").

Week 1 (1/13-1/19) – Introduction

Parker, G. M. (2006). What makes a team effective or ineffective? In J. V. Gallos (Ed.), *Organization development* (pp. 656-680). Jossey-Bass.

Rossett, A. (2009). Tales from the trenches. In *First things fast: A handbook for performance analysis* (2nd ed., pp. 203-239). Pfeiffer.

Week 2 (1/20-1/26) – Basics 1

Ruff-Eft, D. F., & Sleezer, C. M. (2020). Lessons learned. In D. F. Russ-Eft & C. M. Sleezer (Eds.), *Case studies in needs assessment* (pp. 280-288). SAGE.

The following two chapters are combined as a reading:

Sleezer, C. M., Russ-Eft, D. F., & Gupta, K. (Eds.) (2014a). Overview of needs assessment. In *A practical guide to needs assessment* (3rd ed., pp. 15-33). Wiley.

Sleezer, C. M., Russ-Eft, D. F., & Gupta, K. (Eds.) (2014b). Ideas and models that guide practice. In *A practical guide to needs assessment* (3rd ed., pp. 35-49). Wiley.

Week 2 – Optional

ATD Research. (2018). *Needs assessments: Design and execution for success* (White Paper). https://www.td.org/research-reports/needs-assessments

Week 3 (1/27–2/2) – Basics 2

Altschuld, J. W. (2004). Emerging dimensions of needs assessment. *Performance Improvement*, *43*(1), 10-15. https://doi.org/10.1002/pfi.4140430104

Week 4 (2/3–2/9) – Ethical Issues & Case 1

Sleezer, C. M., Russ-Eft, D. F., & Gupta, K. (Eds.) (2014). Dealing with ethical issues. In *A practical guide to needs assessment* (3rd ed., pp. 257-269). Wiley.

Stefaniak, J. E., Mi, M., & Afonso, N. (2015). Triangulating perspectives: A needs assessment to develop an outreach program for vulnerable and underserved populations. *Performance Improvement Quarterly*, *28*(1), 49-68. https://doi.org/10.1002/piq.21186

Week 4 – Optional

AHRD Ethics Taskforce. (2018). *AHRD standards on ethics and integrity* (2nd ed.).
https://cdn.ymaws.com/www.ahrd.org/resource/resmgr/bylaws/AHRD_Ethics_Standards_(2)-fe.pdf
Russ-Eft, D. (2018). Second time around: AHRD Standards and Ethics and Integrity. *Human Resource Development Review*, *17*(2), 123-127. https://doi.org/10.1177/1534484318772123

Week 5 (2/10–2/16) – Data Collection and Analysis & Case 2

Aull, J., Bartley, J., Olson, C., Weisberg, L., & Winiecki, D. (2016). Lesson learned while completing a needs assessment of ITSS, Inc. career development opportunities: A case study. *Performance Improvement Quarterly*, *28*(4), 7-26. https://doi.org/10.1002/piq.21207
Sleezer, C. M., Russ-Eft, D. F., & Gupta, K. (Eds.) (2014). Strategies for collecting and analyzing data. In *A practical guide to needs assessment* (3rd ed., pp. 51-85). Wiley.

Week 5 – Optional

Marrelli, A. F. (2010). Data collection. In R. Watkins & D. Leigh (Eds.), *Handbook of improving performance in the workplace, Vol. 2: Selecting and implementing performance interventions* (pp. 792-816). ISPI.

Week 6 (2/17–2/23) – Cho's participation in the 2025 AHRD Conference in Arlington, VA (no class)

Week 7 (2/24–3/2) – Interviews & Case 3

Mills, E., & Stefaniak, J. (2020). A needs assessment to align perspectives for the career needs of international students. *Performance Improvement*, *59*(9), 6-14. https://doi.org/10.1002/pfi.21936
Russ-Eft, D. & Preskill, H. (2009). Individual and focus group interviews. In *Evaluation in organizations: A systematic approach to enhancing learning, performance, and change* (2nd ed., pp. 313-343). Basic Books.

Week 7 – Optional

Gilmore, E. R. (2006). Using content analysis in human performance technology. In J. A. Pershing (Ed.), *Handbook of human performance technology* (3rd ed., pp. 819-836). Pfeiffer.
Rabionet, S. E. (2011). How I learned to design and conduct semi-structured interviews: An ongoing and continuous journey. *The Qualitative Report*, *16*(2), 563-566. https://doi.org/10.46743/2160-3715/2011.1070

Week 8 (3/3–3/9) – Surveys & Case 4

Russ-Eft, D. & Preskill, H. (2009). Survey and questionnaires. In *Evaluation in organizations: A systematic approach to enhancing learning, performance, and change* (2nd ed., pp. 265-311). Basic Books.
Swart, W. (2021). Academic needs assessment: Continual improvement for academic units. *Performance Improvement*, *60*(1), 19-24. https://doi.org/10.1002/pfi.21950

Week 8 - Optional

Artino, A., La Rochelle, J. S., Dezee, K. J., & Gehlback, H. (2014). Developing questionnaires for educational research: AMEE Guide No. 87. *Medical Teacher*, *36*, 463-474. https://doi.org/10.3109/0142159X.2014.889814
Dillman, D. A., Smyth, J. D., & Christian, L. M. (2009). *Internet, mail, and mixed-mode surveys: The tailed design method* (3rd ed.). John Wiley & Sons, Inc.
Thomas, M. N. (2006). Quantitative data analysis. In J. A. Pershing (Ed.), *Handbook of human performance technology* (3rd ed., pp. 837-872). Pfeiffer.

Week 9 (3/10–3/16) – SWOT Analysis & Case 5

Cho, Y., & Brown, C. (2013). Project-based learning in education: Integrating business needs and student
    learning. *European Journal of Training and Development*, *37*(8), 744-765.
        https://doi.org/10.1108/EJTD-01-2013-0006
Leigh, D. (2010). SWOT analysis. In R. Watkins & D. Leigh (Eds.), *Handbook of improving performance in
    the workplace, Vol. 2: Selecting and implementing performance interventions* (pp. 115-140). ISPI.

Week 9 - Optional

Chermack, T. J., & Kasshanna, B. K. (2007). The use and misuse of SWOT analysis and implications for
    HRD professionals. *Human Resource Development International*, *10*(4), 383-399.
        https://doi.org/10.1080/13678860701718760
Cho, Y., Zhu, M., Techawitthayachinda, R., & Qian, L. (2020). A needs assessment of online core
    courses for student learning in higher education. In D. F. Russ-Eft & C. M. Sleezer (Eds.), *Case
    studies in needs assessment* (pp. 48-60). SAGE.

HRD 5308 COURSE SCHEDULE (May change depending on the circumstances)

Unit	Week	Topic (Bi-Weekly Meeting)	Reading	Assignment
U1 (Intro)	1 (1/13-1/19)	• Introduction • Orientation: 1/14 (Tue) at 7:00pm via Zoom	Parker (2006); Rossett (2009)	• Introduce yourself (1/15) • Discussion 1 (Wed & Sat)
U2 (Basics)	2 (1/20-1/26)	Basics 1: NA Definitions (Bi-weekly meeting 1)	Russ-Eft & Sleezer (2020); Sleezer et al. (2014a, 2014b)	• Discussion 2 • Team ground rules (1/26)
	3 (1/27–2/2)	Basics 2: NA Dimensions	Altschuld (2004)	• Discussion 3 • Client selection (2/2)
	4 (2/3–2/9)	Ethical Issues Case 1 (Bi-weekly meeting 2)	Sleezer et al. (2014); Stefaniak et al. (2015)	• Discussion 4 • One-page proposal (2/9)
U3 (Data Collection)	5 (2/10–2/16)	• Data Collection & Analysis • Case 2	Aull et al. (2016); Sleezer et al. (2014)	• Discussion 5 • Permission letter (2/16)
	6 (2/17-2/23)	2024 AHRD Conference in Arlington, VA (no class)		
	7 (2/24–3/2)	• Interviews • Case 3 (Bi-weekly meeting 3)	Mills & Stefaniak (2020); Russ-Eft & Preskill (2009)	• Discussion 7 • Mid-term evaluation (peer & class) (3/2)
	8 (3/3-3/9)	• Surveys • Case 4	Russ-Eft & Preskill (2009); Swart (2021)	Discussion 8
	9 (3/10-3/16)	• SWOT Analysis • Case 5 (Bi-weekly meeting 4)	Cho & Brown (2013); Leigh (2010)	• Discussion 9 • Progress report (3/16)
	10 (3/17–3/23)	Spring Break (no class)		

U4 (Data Analysis)	11 (3/24–3/30)	• Findings & Critical Success Factors • Draft Presentation: Guidelines (Bi-weekly meeting 5)	SWOT Analysis (draft) (3/30)
	12 (3/31-4/6)	Team Clinic	
	13 (4/7–4/13)	Project Work (Cho's participation in the int'l action learning conference in Manchester, UK)	Draft report & presentation file (4/13)
U5 (Synthesis)	14 (4/14-4/20)	Draft Report Presentation (4/15) Final Report Submission to Client and Me	• Ask for client feedback on findings & recommendations (after draft presentation) • Final report & transmission letter (4/20)
	15 (4/21–4/27)	Final Presentation to Client Reflection	• Client evaluation (4/25, Fri) • Final peer evaluation (4/27) • Reflection paper (4/27) • Course evaluation (online)

Appendix 1: Weekly Discussion Postings

Rubric

Evaluation Criteria	Rating		
	Excellent	Needs Work	Unsatisfactory
Meet the two deadlines (<mark>Wed & Sat</mark>)	Posts (an answer and two comments) were posted by the two deadlines	One of the posts was posted after the deadline	Posts were posted after the deadline, or posts were missing/not submitted
Follow the recommended logical glow: Cite required readings and answer the question	Followed the recommended logical flow: Two required readings were cited, and the week's question was answered	Partially followed the recommended logical flow: Only one of the two required reading was cited, or the answer did not clearly answer the question	Did not follow the recommended logical flow: Required readings were not cited, or the answer did not answer the question
Answer the week's question within three sentences to make it compact and pointed	The answer was written within three sentences to make it compact and pointed	The answer was written in slightly more than three sentences	The answer was long, not meeting the three-sentence requirement
Follow the APA formatting guidelines (7th ed.)	Correctly followed the APA formatting guidelines	There were minor mistakes in following the APA guidelines	Did not correctly follow the APA formatting guidelines

Appendix 2: Team Ground Rules Sample

HRD 5308 – Needs Assessment   Needs Avengers (Abigail, Cali, Sydnee, & Craig)

Team Ground Rules

HRD 5308

Spring 2024

Team Name: Needs Avengers

Members: Abigail Brewer, Cali Davis, Sydnee Mullins, and Craig Ward

Team Lead: Sydnee Mullins

Purpose: The purpose of this ground rules is to set the same expectation to collaboratively undertake a needs assessment with the aim of identifying a performance gap in an organization. Upon identifying the gap, our team will engage with the client to propose a solution designed to enhance the areas that have been identified. We will abide by our ground rules to produce evidence-based findings and recommendations for the client organization.

Documents: We will employ Microsoft Word documents for generating, storing, and collaboratively working on content relevant to the team project. For daily communication, a group iMessage will serve as our primary platform (see below for further elaboration). Our team leader, Sydnee Mullins, will be the final checker and oversee submitting all assignments on behalf of the team. Additionally, Sydnee will communicate with Dr. Cho and share her suggested revision requests with members within the specified assignment deadlines.

Communication: The team will use group text and email to communicate. Zoom meetings will be held weekly on Tuesdays at 8:00 pm CT. If a team member is unable to attend, they should notify the team through group text at least 24 hours prior to the meeting. When communicating with Dr. Cho, the team leader will use her UT Tyler email and relay information to all other members.

Participation: Team members are required to actively participate, demonstrate flexibility, and respect others' time. In instances where a team member encounters challenges with a specific segment of the assignment, they are expected to seek assistance from fellow team members. Collaboration is encouraged, and all team members should collectively support one another. In team meetings, all members should come prepared to discuss upcoming assignments and actively seek feedback from their peers.

Disagreement/Conflict Resolution: In the event of conflicts or disagreements, it is imperative for all team members to maintain a respectful demeanor. Seeking clarification from one another is encouraged to prevent misunderstandings. Every team member is given the opportunity to express concerns and thoroughly communicate their thoughts. We will make decisions through team consensus, prioritizing the best interests of the team. If a consensus proves elusive, the team will defer to the majority rule. Should the need arise, seeking guidance from Dr. Cho is permissible; however, contacting her via email should only be considered after exhausting all other available options.

Appendix 3: One-Page Proposal

Rubric

Evaluation Criteria	Rating		
	Excellent	Needs Work	Unsatisfactory
Key Elements	All key elements are included: title, purpose (one sentence), context (problem statement), key stakeholders, frame factors (the scope of the project), data collection & analysis (the more specific the better!), and schedules and division of labor (who is doing what).	One or two of the key elements is/are missing.	Two or more of the key elements are missing.
Being Thorough	The proposal is thorough. It gives an excellent idea about the project and how the team will conduct it.	The proposal is mostly thorough. It gives a good idea about the project and how the team will conduct it. Needs more details to be thorough.	The proposal is not thorough. It does not give an idea about the project and how the team will conduct it. Needs much more details to be thorough.
Page Limit	The proposal is written in one page as required.	The proposal is written in a bit longer than one page, violating the assignment requirement.	The proposal is written in more than one page, violating the assignment requirement.
Revisions	No revision is required after the initial submission of the proposal.	One revision is required after the initial submission of the proposal.	More than one revision is required after the initial submission of the proposal.
Clarity	The proposal is pointed, clear, and free of typos and grammar mistake(s).	The proposal is mostly pointed and clear and includes only a few typos and grammar mistakes.	The proposal is not pointed and clear and includes several typos and grammar mistakes.

Appendix 4: One-Page Proposal Sample

HRD 5308: Needs Assessment   Gapminders (Anjelica, Lara, Elizabeth, & Julie)

Needs Assessment on Customer Engagement at Niffty Looks

Purpose: This needs assessment project aims to identify performance gaps in customer engagement and provide recommendations for a proposed action plan to close the gaps.

Context: Our client organization is a clothing company, Niffty Looks. The founder and owner, Ernest Ogutu, found that it is challenging to have continuous customer engagement and has noticed a decrease in sales. By conducting a needs assessment, we can assist in identifying performance gaps in customer engagement that may be impacting the desired outcomes our client seeks.

Key Stakeholders: Founder and owner Ernest Ogutu, his marketing assistant, Veronica Gonzalez, and 25 previous customers that purchased in the original sale.

Frame Factors: Internal factors include a limited timeframe to complete this project and collaborating virtually. External factors involve receiving full participation from the 25 previous customers in a survey, only meeting virtually, and limited scheduling due to their responsibilities.

Data Collection and Analysis:

- Literature review on customer engagement and interventions in the clothing industry
- Document review of the client's current materials
- Interview with two key stakeholders.
- Survey with 25 previous customers
- Content analysis of the interview data
- Descriptive statistical analysis of the survey data
- SWOT Analysis as the final step of data analysis

Project Milestones and Division of Labor:

Project Milestone	Due Date	Leader
Team Ground Rules	1/28	Gapminders
Client Selection	2/4	Gapminders
Initial Client Meeting	2/4	Gapminders
One-Page Proposal	2/11	Gapminders
Permission Letter	2/18	Anjelica
Data Collection:		
a. Literature Review	2/28	Lara
b. Interviews	2/28	Anjelica
c. Document Review	2/21	Julie
d. Survey	2/28	Elizabeth
Data Analysis:		
a. Content analysis of the interview data	3/13	Lara
b. Descriptive statical analysis of the survey data	3/20	Julie
c. SWOT Analysis (draft)	3/31	Gapminders
Progress Report	3/24	Elizabeth
Draft Report and Presentation	4/14 & 16	Gapminders
Solicit client feedback on findings and recommendations	Week of 4/15	
Final Report Submission to Client and Dr. Cho	4/21	Anjelica
Final Presentation to Client	Week of 4/22	Gapminders

Appendix 5: Permission Letter Sample

Becoming Us COLLECTIVE

February 10, 2024

Team JJS HITZ
University of Texas at Tyler
3900 University Blvd.
Tyler, TX 75799

Dear Team JJS HITZ,

I am writing to request a needs assessment for Becoming Us Collective, LLC. We are a consulting firm that provides training on Equity and Inclusion to school districts in California. Our training assists school districts that have been identified by the federal government as having Significant Disproportionality within IDEA regulations. Currently, our clients are funded by the Comprehensive Coordinated Early Intervening Services (CCEIS).

Due to positive results from previous school districts, we have rapidly grown in assignments and clients. However, we are struggling with our onboarding process. We don't have a well-written informative onboarding guide for future employees.

Becoming Us Collective, LLC is seeking well-structured written materials to present to our new employees. Enhancing our onboarding process is crucial to instill confidence in our clients that we can effectively deliver the services they are seeking. We are eager to collaborate with you in refining and improving these processes.

I give Team JJS HITZ permission to use our company name in your report. Please deliver your report to me by April 21, 2024. We are excited to work with you on this project. Don't hesitate to contact me when I can help with the process.

Sincerely,

Elizabeth V. Claes

Elizabeth Claes
CEO
1893 Carleton Drive
Turlock, CA
elizabeth@uscollective.net
209.585.8393

Appendix 6: Needs Assessment Report Rubric

Criteria	Rating			
	Excellent	**Good**	**Needs Improvement**	**Unsatisfactory/ No Submission**
Required Elements of the Report - *Did you include all required elements of the report?*	The report includes all required elements: cover page with title, executive summary, acknowledgements, table of contents; main body (introduction, data collection & analysis, findings & recommendations), appendices, and references.	The report includes all but one or two of the required elements listed.	The report includes all but two or more of the required elements listed.	The report does not include many required elements listed.
Organization and Logical Flow - *Is the report well-organized? Does it have a logical flow?*	The report is well-organized, and ideas flow logically. Writing demonstrates an understanding of the data obtained from all sources.	The report is adequately organized, and ideas are arranged reasonably. Writing demonstrates an understanding of the data obtained from all sources.	The report is somewhat organized, and ideas do not flow well. Writing does not demonstrate an understanding of the data obtained from all sources.	The report lacks logical flow. Writing does not demonstrate any understanding of the data obtained from all sources. Or the report was not submitted.
Clarity - *Is the report written in ways that your client can easily understand?*	The report is well-written, clear, and free from grammar and spelling errors. Ideas are clearly stated for your client to easily understand.	The report shows above average quality and clarity in writing. There are minor errors in grammar and spelling. Ideas are mostly well-stated for your client to understand.	The report shows an average quality of writing. There are some errors in grammar and spelling. Most ideas are not well-stated for your client to understand.	The report shows a below average writing quality. There are frequent errors in spelling and grammar. Ideas are not stated for your client to understand. Or the report was not submitted.
Consistency *– Does the report show consistency in information presentation?*	The report shows consistency in information presentation (e.g., design considerations).	The report largely shows consistency in information presentation.	The report somewhat shows consistency in information presentation.	The report lacks consistency in information presentation.
Professional Outlook *– Is the report created in a professional manner?*	The report is created in a professional manner so that it effectively communicates content with the balancing act of text and visuals.	The report is appropriately created in a professional manner so that it communicates content with the balancing act of text and visuals.	The report is somewhat created in a professional manner so that it somewhat communicates content with the balancing act of text and visuals.	The report is not created in a professional manner and does not balance text with visuals to effectively communicate content.
Attention to Detail - *Did you follow the APA (7th ed.) formatting guidelines?*	The report includes required citations. The APA formatting guidelines are used in text and references. The report demonstrates the authors' ability to pay attention to detail.	The report includes required citations of ideas. There are minor issues noted in APA formatting guidelines in text and references.	The report includes required citations of most ideas. Some errors are noted in APA formatting guidelines in text and references.	The report does not include required citations of ideas. Several errors are noted in APA formatting guidelines in text and references. Or the report was not submitted.

Appendix 7: Client Feedback Sample

tok TOKYO OHKA KOGYO AMERICA, INC.
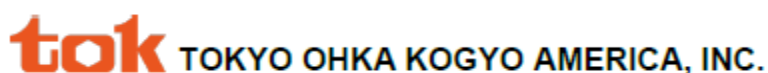
Digital Onboarding Needs Assessment Project Feedback (20/20)

Report (10/10)

- The report clearly indicates the purpose and factors used in the needs assessment.
- Data collection was accurate, and the various methods used to collect the qualitative data allowed for the team to identify many areas lacking in the digital onboarding.
- SWOT analysis correctly outlined strengths, weaknesses, opportunities, and threats and brought awareness on many items that have not been considered.
- Recommendations provided were reasonable and clearly stated. The added bonus was the detailed implementation steps!
- Overall, the report was very detailed and addressed many areas that our organization will utilize in improving our onboarding process.

Presentation (10/10)

- The team presented the information clearly and professionally.
- The power point was organized and outlined the scope of the assessment.
- The presenters were professional and articulated the information well.
- The slides provided great visual aids to summarize the data and made it simple to understand.

Final Summary

Team TORX did an exceptional job in their efforts to research, collect and analyze data, and in presenting their findings with recommendations that we were able to implement. The team was able to provide perspective that our organization had not considered through their needs assessment. They took this consultation seriously and worked together to deliver an outcome that not only has already improved our onboarding process, but ultimately has allowed our HR team to consider reassessment in other areas by utilizing this approach. I appreciated their willingness to gather the qualitative data in a variety of ways and for partnering with our team. They were extremely easy to work with and maintained their professionalism when speaking with each of our team members. This is a group that TOK America would indeed hire to assist us as real consultants and we look forward to the opportunity of working with them again.

Oregon Plant / Headquarters
4600 NE Brookwood Parkway, Hillsboro, Oregon 97124
Tel (503) 693-7711 Fax (503) 693-2070

Corporate Sales Office
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Appendix 8: Peer Evaluation Form

Evaluate each member (including you) by circling the number that best reflects the extent to which he/she participated, prepared, helped the group excel and was a team player. Use the following ratings:

4 Usually (over 90% of the time)   2 Sometimes (less than half the time)
3 Frequently (more often than not)   1 Rarely (never or once in a great while)

	Team Player	Helps Group Excel	Participation & Communication	Preparation
Preparation Prepared for team meetings; has read course material and understands the issues and subject matter; completes team assignments on time; attends and is on time to team meetings				
Participation & Communication Articulates ideas effectively when speaking or writing; submits papers without grammatical errors; listens to others; encourages others to talk; persuasive when appropriate				
Helps Group Excel Expresses great interest in group success by evaluating ideas and suggestions; initiates problem solving; influences and encourages others to set high standards; doesn't accept just any idea but looks for the best ideas; stays motivated from beginning to end of projects				
Team Player (Cooperation) Knows when to be a leader and a follower; keeps an open mind; compromises when appropriate; can take criticism; respects others				
Member Name				
	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely
	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely
	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely
	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely
	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely
(yourself)	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely	4 usually 3 frequently 2 sometimes 1 rarely

(Source: Adapted from Baker (2008), p. 205)

Please use this space for any additional comments.

_____

Honor Pledge: To the best of my recollection and ability, the above ratings accurately reflect the performance of my peers as well as mine.

Signature: _____   Date: _____